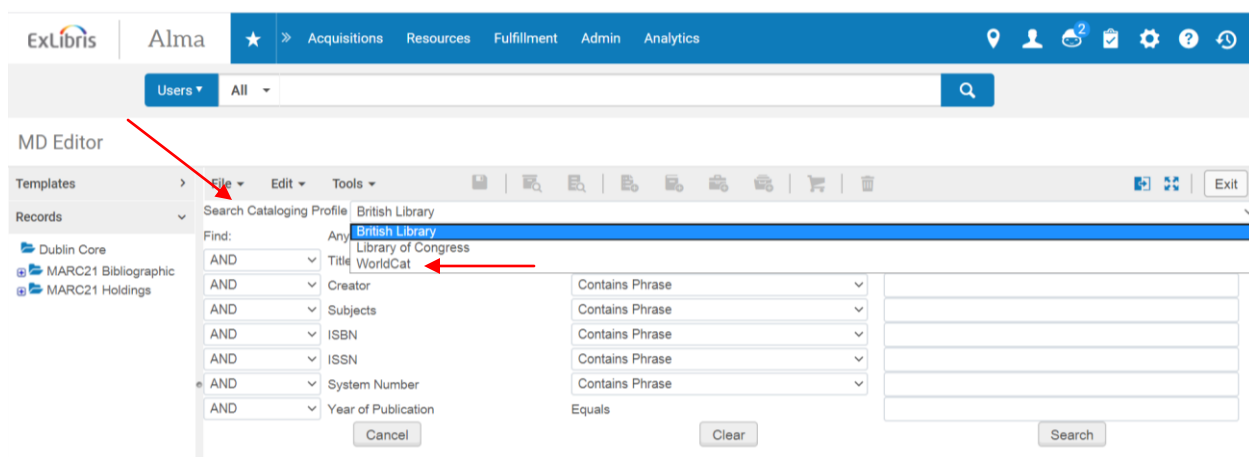
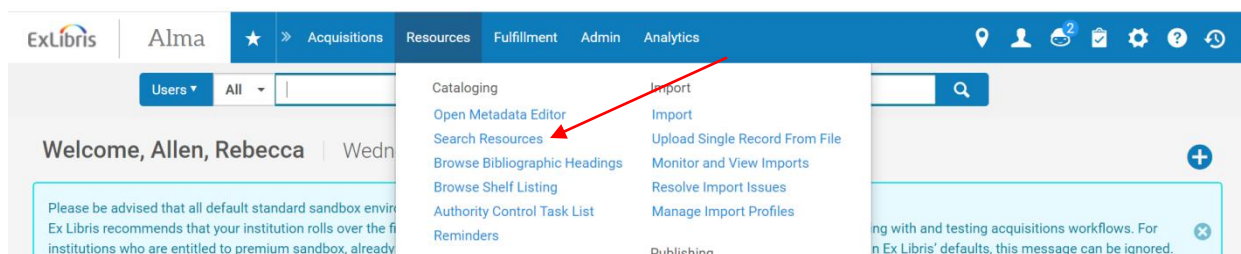
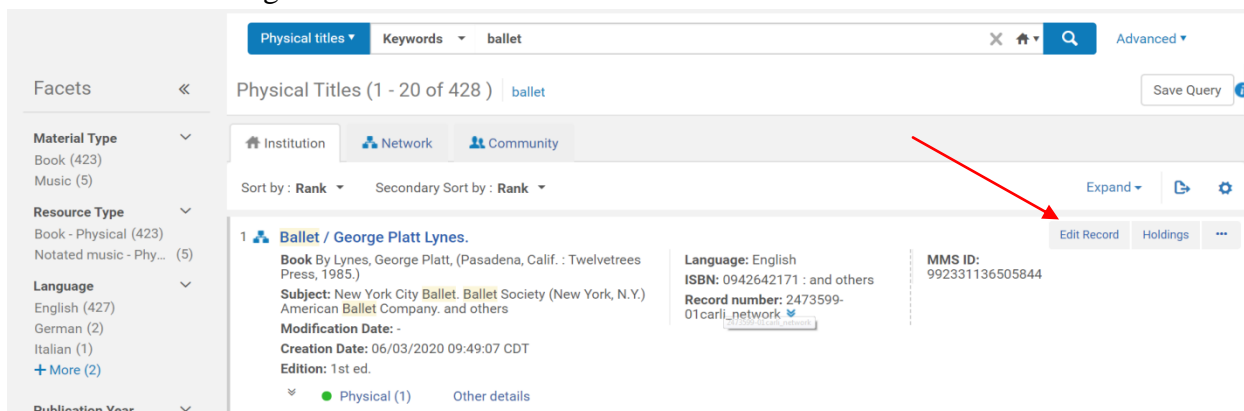


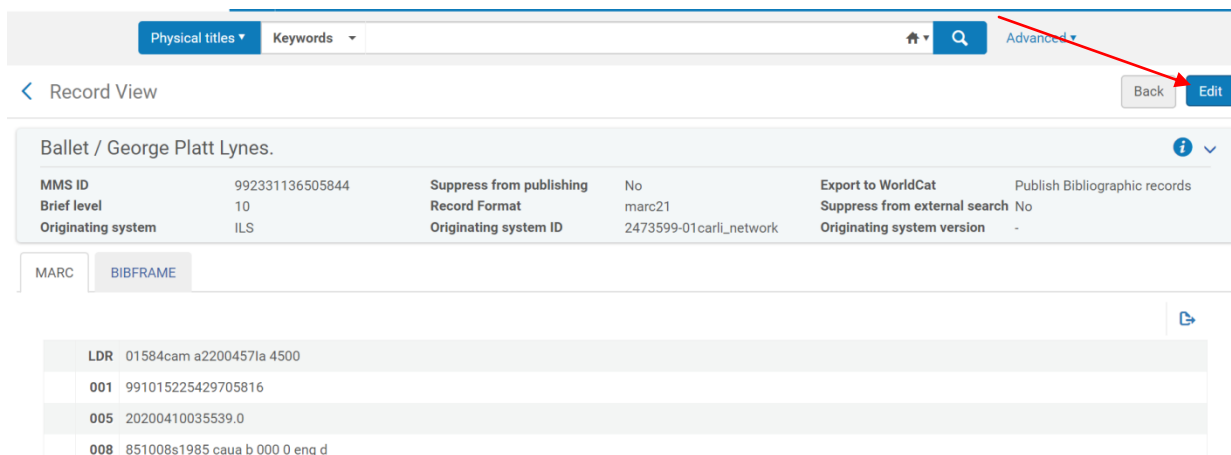
## ALMA Copy Cataloging

1. Find and export a record from OCLC Connexion client-
  - a. Optionally use the **Search Resources** function to import a record from WorldCat.

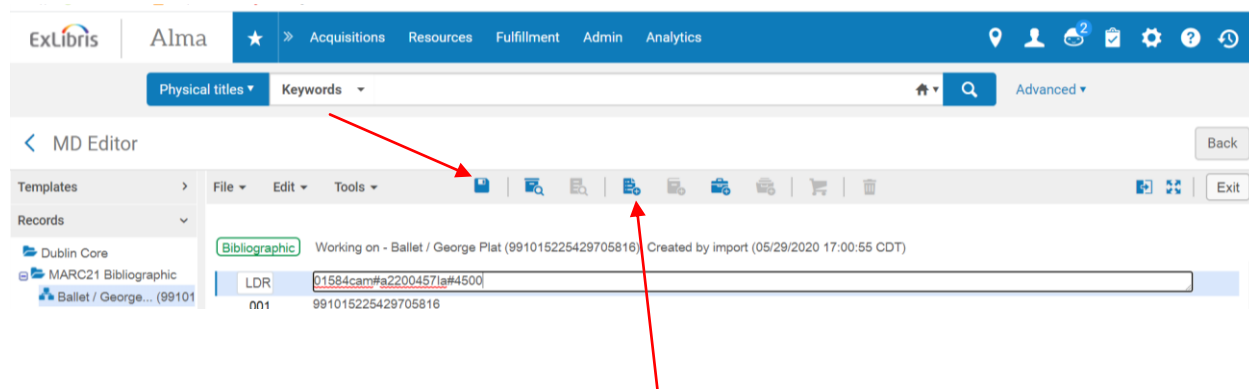


2. If you use Connexion to export the record, it will appear in the Network Zone (NZ) with no attached holdings.
3. Open the record in the Metadata (MD) Editor, either by clicking **Edit Record** from the results list or clicking the blue **Edit** button in the Record View.

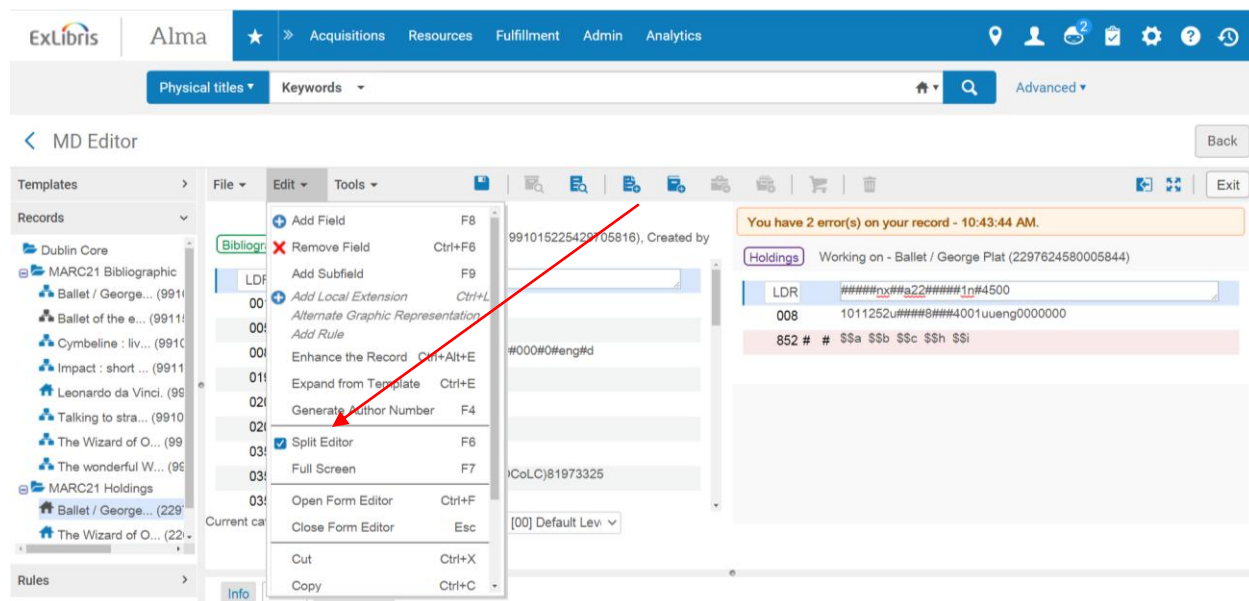




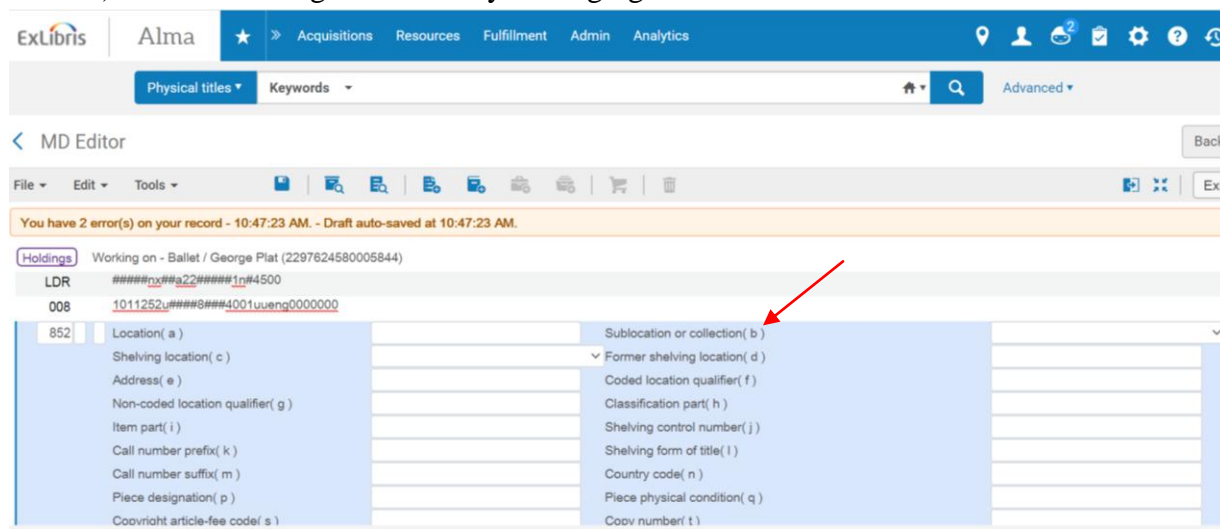
4. Once you've verified that the bib record is correct, click on the **floppy disk icon** (or use **ctrl+s** keyboard shortcut) to save the record in the NZ.
  - a. Alma is currently configured to automatically export bib record data to WorldCat. There's no need to manually export.



5. Add a holdings record by clicking on the **dog-eared piece of paper icon** (or use **ctrl+alt+s** keyboard shortcut)
  - a. This will open a holdings record in split view. To return to a full screen view, click into a field in the holdings, use the **Edit** drop down menu, and uncheck the **Split Editor** option. You can also do this using **F6** as a keyboard shortcut.



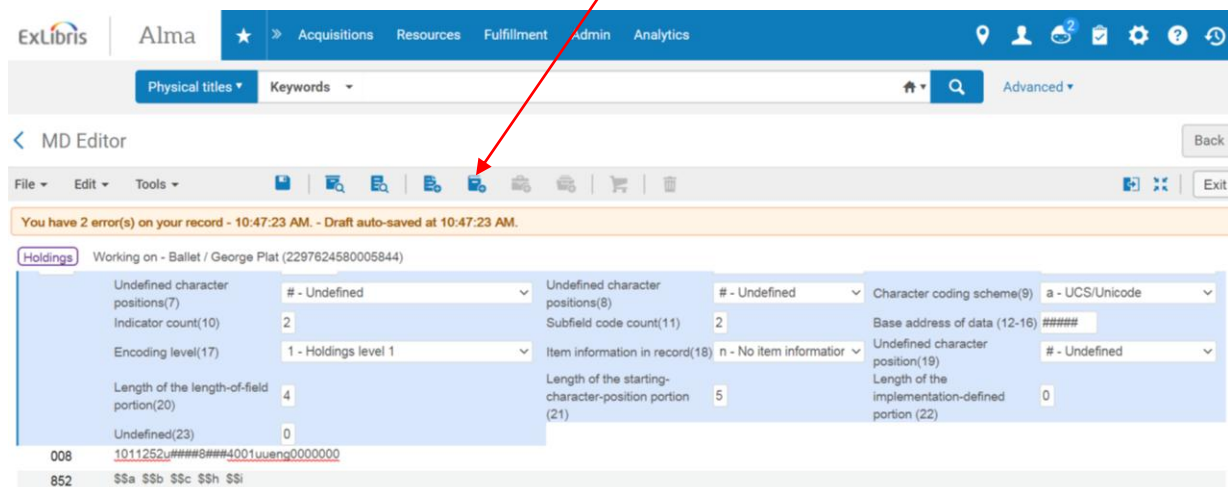
6. Make necessary changes to the LDR, 008, 852, and any additional fields that need to be added. You can manually type in the entries, or use the **ctrl+f** shortcut to open a form you can fill out for each of the fields. You will first need to add our institution code (SPI) to \$\$b in 852 before you can add additional subfields. You will be using subfields **C** (shelving location), **H** (Call number), **I** (Cutter number, i.e. the first four letters in the creator's last name), **K** (only used for special designations such as Oversize), and **T** (copy number) most often for general Dewey cataloging.



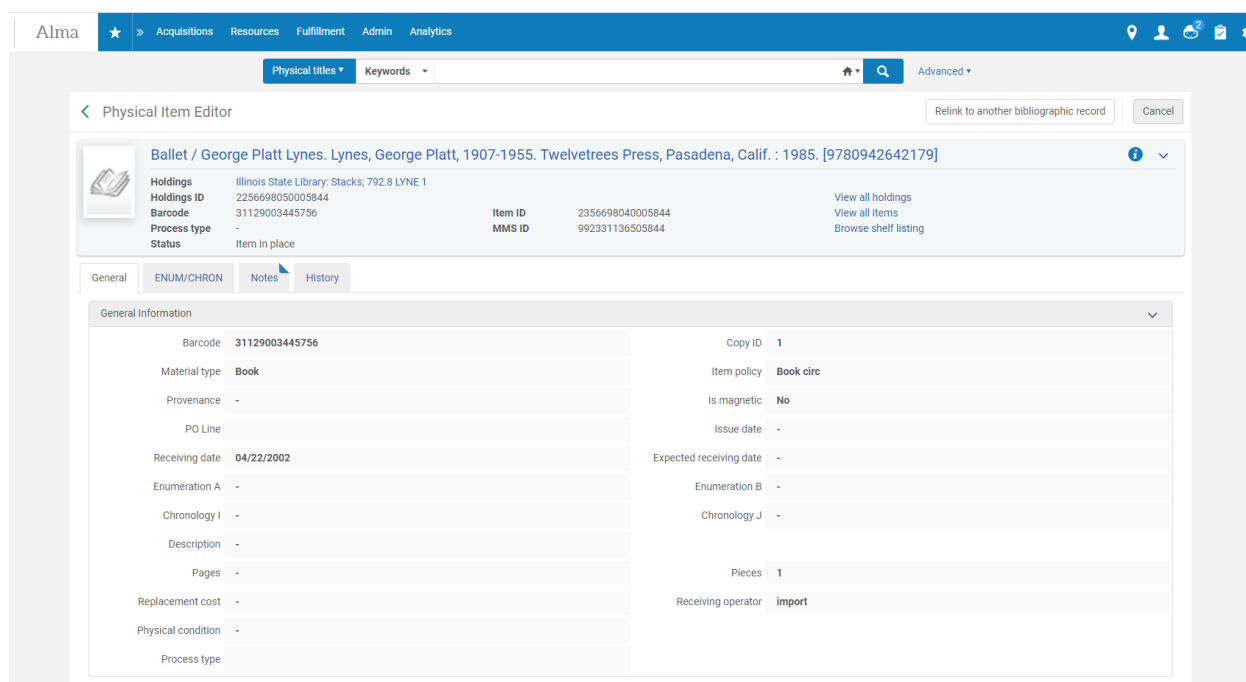
- a. It is possible to create a template that will automatically populate those fields that are used most often. Training on this is forthcoming.

- b. You can use the **Edit** drop down menu to add additional fields or subfields (such as 853 and 863 fields) to a holdings record. Keyboard shortcuts **F8** (Add Field) and **F9** (Add Subfield) can also be used.

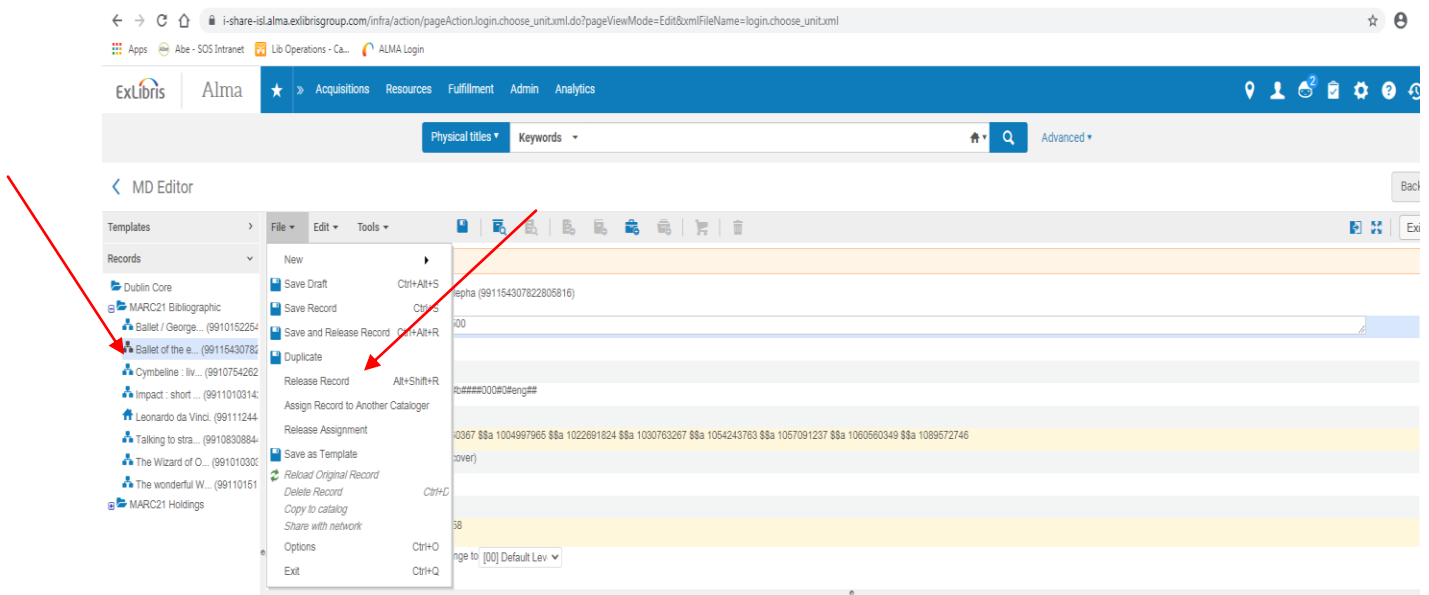
- 7. Add an item record by clicking on the book icon (or use **alt+I** keyboard shortcut)



- 8. Input the barcode, copy number, replacement cost, and any other pertinent information (enumeration, chronology, etc.) into the Physical Item Editor.
  - a. Note: The call number only needs to be re-entered in the Location Information in the Physical Item Editor if it differs from the call number entered in the holdings record. Generally we won't need to add anything here.



- b. Note that, as of now, using a scanner to input the barcode will save and close the Physical Item Editor automatically. As a result, it's recommended that you scan the barcode last.
9. Save and exit the item record to return to the holdings.
10. Once you're finished working with the record, you can then release the record. The item will be hidden from Primo and Alma while you're working on it to prevent multiple people from editing the record simultaneously. You can release the record by using the **File** drop down and selecting **Release Record (Alt+Shift+R** on the keyboard) or clicking on the folders along the left side of the page and releasing the records held there.
  - a. Alma should prompt you to save a record and release it when you try to exit the MD Editor.



11. Once the record is released, it will appear in Primo.